

## APPLICATION CHECKLIST AND INSTRUCTIONS

This checklist includes all materials required to complete a Stewardship application for property and easement acquisition. **We cannot make a final decision on a grant until all materials have been received and approved.**

Please submit **two separate copies** of your application materials (**one original and two copies of the appraisal**) to your Region Community Services Specialist (CSS), and use this checklist to track what you have submitted. Attachments 2-8 must be included with your application form. Other attachments may be submitted as they become available. If you are applying for a grant under the Local Park Aids, Urban Green Space, Urban Rivers or Acquisition of Development Rights Programs, there is an advantage to sending us the appraisal before projects are rated and ranked because you will receive extra rating points if you do so.

☐ **1. Application Form 8700-259 (R 10/05)**

☐ **2. Organization Information** (submit once each year)

- ☐ Board of Directors
  - Name, address, telephone number and affiliation of current Board members
- ☐ Financial Statement
  - Copy of most recent audited financial statement or most recent 990 filing to the IRS (talk to your CSS if you do not have either of these documents)

☐ **3. Project Description**

- ☐ Project narrative and proposed land management plan
  - The project narrative and management plan is used to evaluate, rate and rank projects. A complete, concise narrative will improve your chance of receiving a grant. Please follow the format contained in the guidelines, "Developing Project Narratives and Land Management Plans" (see Appendix A).
- ☐ Planning
  - List any plans the project supports, including Smart Growth comprehensive plans or other plans that have as a purpose protecting natural resources or providing opportunities for nature-based outdoor recreation. Explain how the project implements recommendations in the plan. Indicate if the site is listed in the Natural Heritage Inventory or the Wisconsin Land Legacy Report.
- ☐ Linkages
  - If your project complements other land conservation efforts in the area, discuss the relationship between the projects.
- ☐ Community support and partnerships
  - Describe support or opposition to the project by local governments and other organizations. Also list organizations or government agencies involved in the project and explain their roles. Indicate if you plan to transfer title to a third party.

**Note:** If this application is for acquisition of a parcel of land that is within the boundaries of a Big Scope Stewardship Project that has already approved for grant funding, you may skip this section. If the application proposes to expand the boundaries of an existing Big Scope Stewardship Project, you may explain the reason for the expansion rather than redoing the entire project description.

☐ **4. Property Information**

- ☐ Name of property owner and address of property
- ☐ Property description
  - If you included a description of the property as part of the project narrative, you may skip the property description here. However, if the property is part of a larger Big Scope Stewardship Project that contains a number of parcels, and therefore was not specifically described in the projective narrative, please describe the parcel and its importance to the overall project, including the degree to which it is threatened by development. Include a physical description, number of acres, unique features, current usage and land management problems. If you intend to employ any land management practices different from those contained in the management plan for the Big Scope Stewardship Project, also discuss those.

- ☐ Zoning
    - *How is the property zoned?*
  - ☐ Relocation
    - *Indicate if relocation is applicable. See NCO "Land Acquisition Guidelines" for information on relocation. (You may need to prepare a relocation plan and pay relocation benefits if the acquisition displaces a tenant.)*
  - ☐ Encumbrances and/or problems
    - *Describe any easements, liens, deed restrictions, leases or special agreements that encumber the property or will be placed on the property as part of the transaction. If the property is currently being leased, attach a copy of the lease if it will continue after conveyance to the grant applicant. Include any special agreements with the landowner that will be a future encumbrance. If there are any threatened civil or criminal proceedings that could impact the property, claims of adverse possession or other problems, describe those here also.*
  - ☐ Other government programs
    - *If the property is enrolled in another other government program that restricts use of the property, you must submit a copy of any written agreements that exist, and explain how the program impacts the property. For instance, if the property or part of the property has a Forest Management Plan under the Managed Forest Law, we will need to see a copy of the management plan. The DNR will evaluate whether the restrictions under the other program are compatible with the goals of the Stewardship subprogram funding the grant.*
  - ☐ Legal description of the property covered by the grant
    - *Correct legal description that clearly defines the property for recording purposes. If the legal description refers to a Certified Survey Map (CSM), enclose a copy of the CSM, which is needed for GIS mapping.*
- ☐ **5. Board Resolution authorizing the application and identifying authorized representative**
  - *See Sample Board Resolution Form*
- ☐ **6. Maps showing location and boundaries of the project/property**
- ☐ County map
  - ☐ Plat map
  - ☐ Topographic map
  - ☐ Aerial photograph
  - ☐ Site plan map
- Do a simple site development map for the property that shows existing or planned buildings, parking areas and other improvements; easements of record; habitat restoration areas; special features and archeological sites.*
- ☐ **7. Environmental Hazards Assessment Form 1800-1**
  - *Form 1800-1 may be completed by the grant applicant. A Phase 1 Environmental Assessment Report prepared by a firm that specializes in environmental hazards may be required in some circumstances.*
- ☐ **8. Seller's Warranty Deed**
  - *A copy of the seller's warranty deed is necessary to meet statutory requirements for the program.*
- ☐ **9. Real Estate Appraisal that meets DNR standards (1 original and 2 copies)**
  - *See NCO "Land Acquisition Guidelines" for information on DNR appraisal requirements.*
- ☐ **10. Accepted Option and/or Offer to Purchase**
  - *Submit both the signed option and offer to purchase, if both have been executed.*
- ☐ **11. Draft Easement, if applicable**
  - *See "Grant Requirements for Conservation Easements" if you are applying for a grant to acquire an easement or using an easement as part of your sponsor match. The draft easement must be prepared by or reviewed by an attorney before submittal.*

☐ **12. Title Commitment and Title Policy**

- *If you are requesting an escrow closing, you must submit the Title Commitment and backup materials that explain the exceptions before the closing, and the Title Policy after the closing.*
- *If you will be requesting reimbursement after the closing, you must submit the Title Policy and backup materials before we can authorize payment.*

☐ **13. Draft Access Easement (for landlocked parcels only)**

- *If the property is landlocked, there must be a way to reach it. The usual mechanism is for the project sponsor or seller to provide an access easement over other land they own. If your property is landlocked, discuss this matter with your CSS early in the grant process.*

☐ **14. Draft Mortgage Subordination Agreement**

- *For easements only. Required when the property is encumbered with a mortgage or land contract.*

☐ **15. Supplemental Information for second appraisal (submit one copy as a separate packet only if your appraisal is over \$200,000)**

- ☐ Name and telephone number of landowner
- ☐ Describe any special rights being retained by the landowner (not necessary for easements)
- ☐ Describe information known about existing encumbrances on the Property, for instance MFL, CRP, etc.)
- ☐ Copy of current or previous year's tax bill

☐ **16. Supplemental Information (needed if you are submitting other property as sponsor match)**

- ☐ Project Description (see #3 above)
- ☐ Property Information (see #4 above)
- ☐ Maps - county, plat, topo, aerial, site plan
- ☐ Survey, if available
- ☐ Environmental Hazards Assessment Form 1800-1/Phase 1 Assessment Report (see #7 above)
- ☐ Appraisal (**1 original, 1 copy**) - value of the property as of, or prior to, the date it was conveyed to the grant applicant
- ☐ Title Insurance Policy (include backup information for exceptions)
- ☐ Recorded Access Easement (if needed because property is landlocked)
- ☐ Draft conservation easement, if applicable (DNR must approve the easement before execution) (see #11 above)
- ☐ Recorded Warranty Deed or recorded conservation easement (after execution)
- ☐ Baseline Documentation Report signed by seller and buyer (for easements only)
- ☐ Recorded Mortgage Subordination (easements only; needed if property is encumbered with a mortgage or land contract)
- ☐ Supplemental information for the second appraisal (see #15 above)